

Ireland Strategic Investment Fund

H1 2019 Update

Including Economic Impact Report FY 2018

Published 15 July 2019



Gníomhaireacht Bainistíochta an Chisteáin Náisiúnta
National Treasury Management Agency

Ciste Infheistíochta Straitéisí d'Éirinn
Ireland Strategic Investment Fund

Executive Summary



Following the challenging market conditions in 2018, performance has been strong year to date 2019

- ISIF is a long term investor and performance needs to be considered over time.
- The Fund is well diversified with solid performance overall, in H1 2019 Fund performance was +3.1% with since inception performance of +2.3% p.a. to end June 2019.



ISIF's key market differentiators are the basis for ISIF's impact in the market – flexible, long term and trusted Sovereign Partner to businesses and co-investors

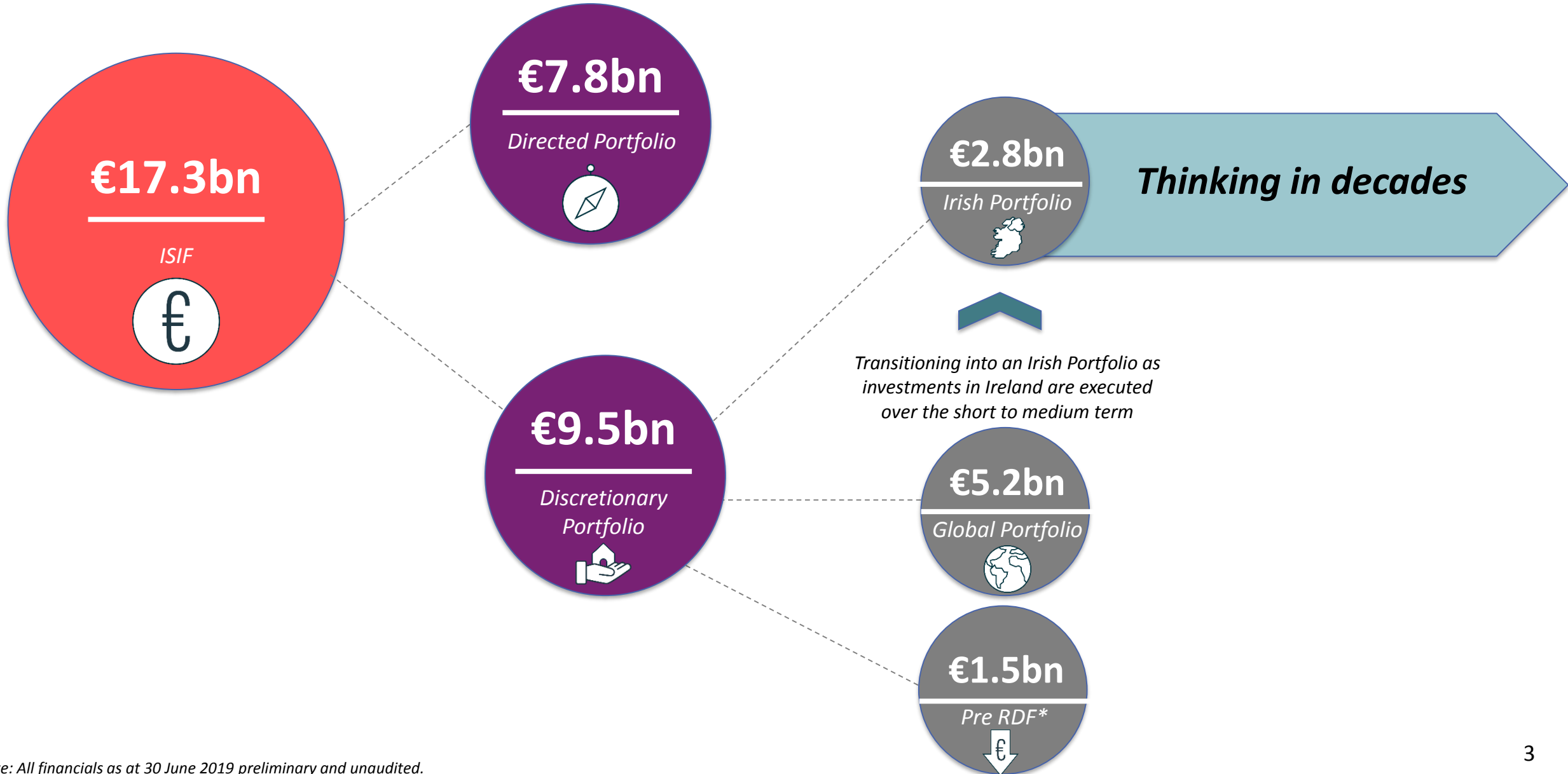
- ISIF leverages these strengths through our strategic partnerships and joint venture investing in sustainable businesses and platforms in the Irish market.
- In 2018 over 60% of ISIF commitments were to scale and sustain existing partnerships where ISIF was an initial investor in new and innovative platforms with this trend continuing to a lesser degree in H1 2019.



The ISIF has altered course in response to the evolving economic conditions and has re-aligned its investment approach directly with the Priority Themes identified by the Minister; Regional Development, Housing, Indigenous Businesses, Climate Change and Brexit

- In H1 2019 ISIF committed €295m across Priority Themes of Regional Development, Housing, Indigenous Businesses and Climate.

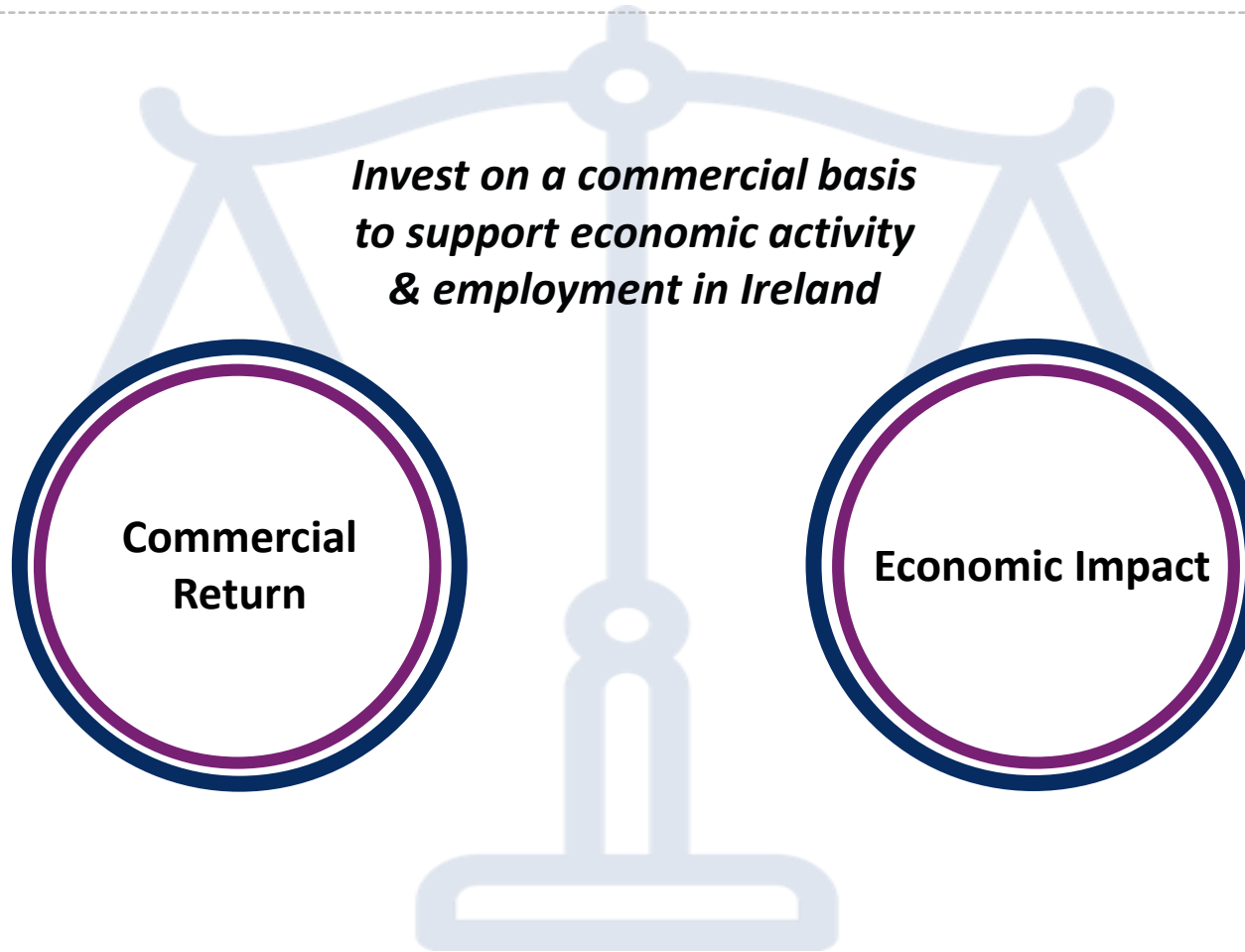
Overview of ISIF - 30 June 2019



Note: All financials as at 30 June 2019 preliminary and unaudited.

*Pre Rainy Day Fund (RDF) sub portfolio established in June 2019 - €1.4bn held in exchequer notes at end June with the balance to transfer imminently

ISIF's Double Bottom Line Mandate



Market Differentiators

- ✓ Long term timeframe
- ✓ Flexible, Innovative & Creative
- ✓ Trusted Sovereign Partner to businesses and co-investors



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02 | 2018 Economic Impact Results



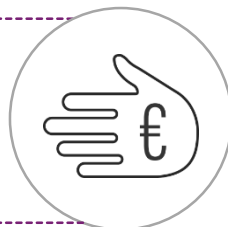
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ISIF delivering on Double Bottom Line – Commercial Return and Economic Impact

Commercial Return¹

ISIF adding **€859 million** of value since December 2014

+3.1% H1 2019, **+2.3% p.a. since inception**



Early positive returns from the Irish Portfolio **€408 million**

+1.8% H1 2019, **+6.7% p.a. since inception**



Global Portfolio² adding **€451 million**

+3.8% H1 2019, **+1.5% p.a. since inception**



Economic Impact

€12.5bn
Projects
unlocked

ISIF Capital unlocks €8.1bn third party capital



Co-investment
FY 2018

32,000
jobs
supported



55% jobs
ex-Dublin
FY 2018

1,877
Homes
Sold

Funding advanced to sites/development to deliver **15,000 new homes** out to 2025

Over **500MW** of energy projects currently supported with a development pipeline of over **150MW**

650
MW
Energy
Projects

¹ All financials as at 30 June 2019 preliminary and unaudited.

² Global Portfolio Transition Strategy (GPTS) transitions the ISIF from a Global Portfolio into an Irish Portfolio as investment opportunities in Ireland are executed and capital drawn down over the short to medium term. The overall objective of the GPTS is to ensure capital is available as required to fund Irish investments while earning a return on these global assets in the interim, as compared with the alternative approach of converting all global assets to cash at the outset.

ISIF Investment Strategy 2.0 is focussed on Priority Themes



Regional Development

€500m - €750m of commercial investment into the Regions



Housing

25,000 homes by 2025



Indigenous Businesses

Support and scale >100 businesses over 5 years



Climate Change

Investments to deliver substantial carbon reduction



Brexit

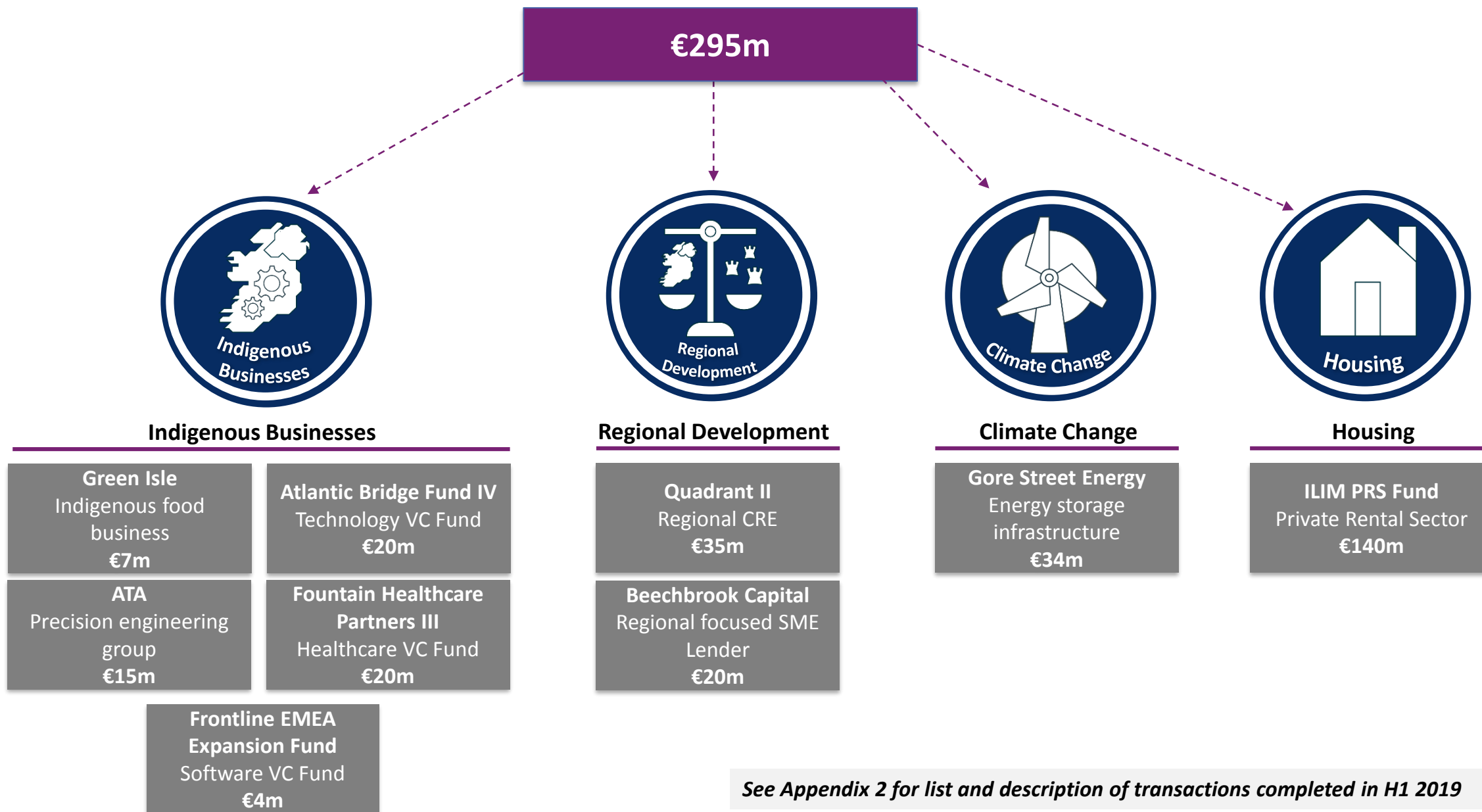
Commercial investment to enable long term product and market diversification



National Initiatives

High impact substantial investments

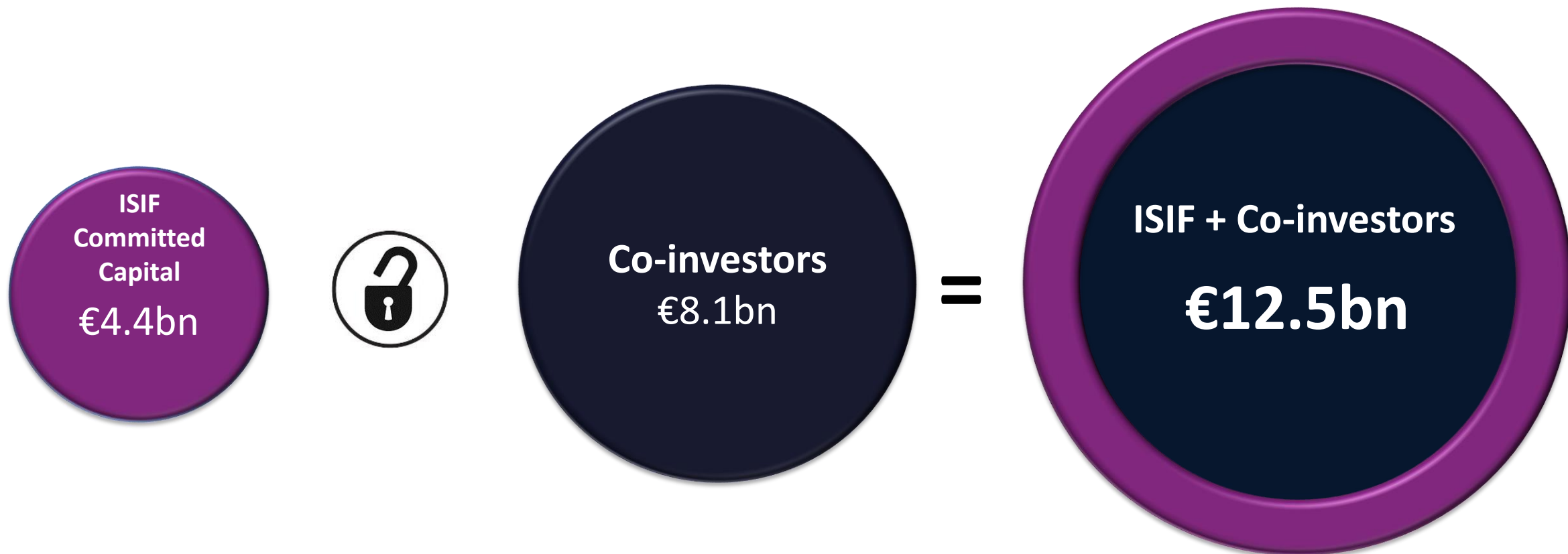
H1 2019 - €295m committed across the Priority Themes



See Appendix 2 for list and description of transactions completed in H1 2019

ISIFs capital unlocks a further €8.1bn of capital

Leveraging capital for maximum Economic Impact from ISIF resources





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FY 2018 Economic Impact Metrics

Reflects detailed survey data for FY 2018. Given the quantum of surveys of investees and underlying investees of indirect investments and the comprehensive analysis completed, finalisation and publication of this economic impact data lags 6 months behind.



Jobs Supported by ISIF capital: 32,068
YoY: +1,282 jobs



Employment by Region:
45% Dublin/ 55% ex-Dublin
YoY: Geographically balanced



Gross Value Add (GVA)¹ : €1.1 billion
YoY: +€102 million



Wage Bill: €948 million
YoY: Flat



Turnover: €2.2 billion
YoY: +€273 million

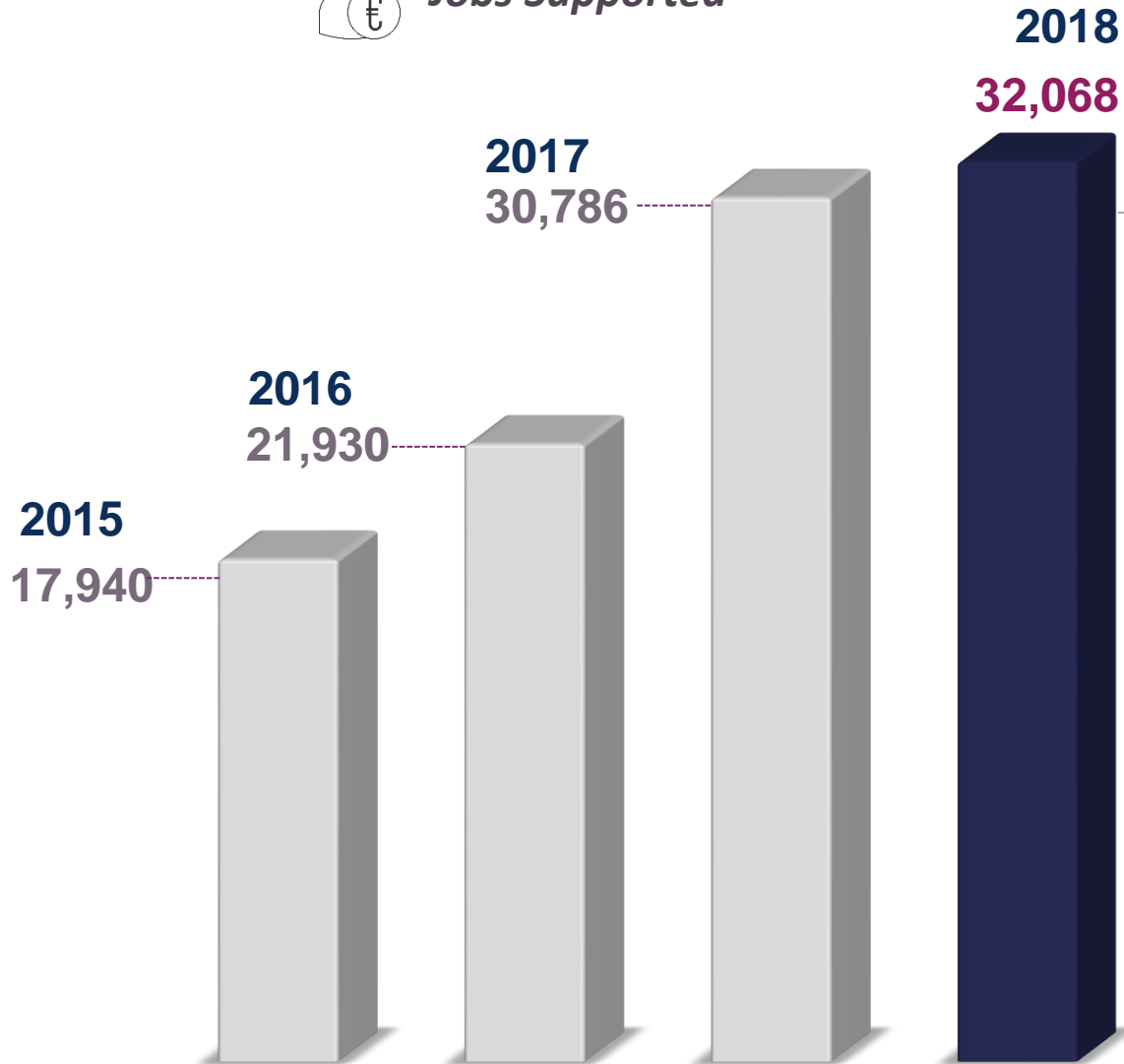


Exports: €485 million
YoY: -€46 million

Employment supported by ISIF increased across the portfolio since inception



Jobs Supported



Construction employment has increased over time from 1% of jobs supported in 2015 to over 26% of jobs supported in 2018 due to ISIF's housing activity

Strong Underlying Employment Growth

Employment FY 2018

32,068 Jobs Supported
+1,282 jobs on FY 2017



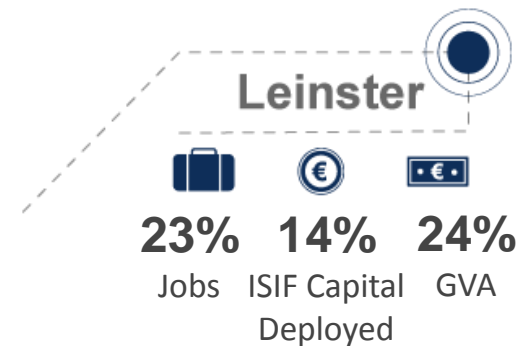
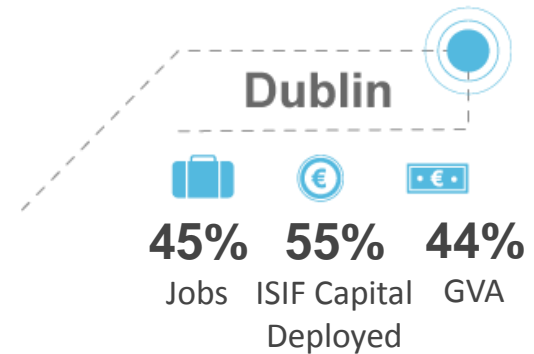
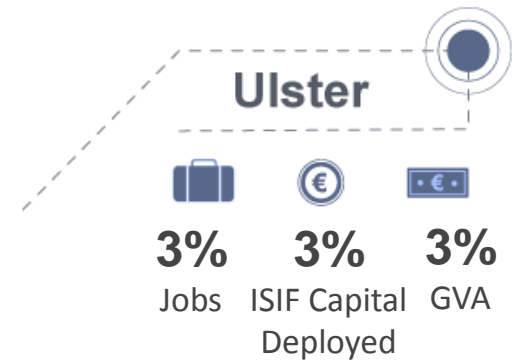
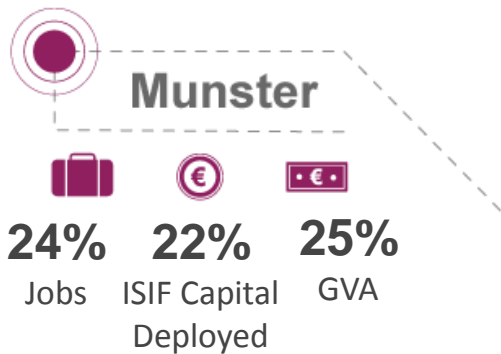
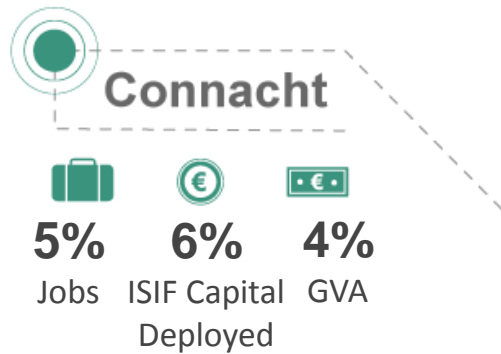
Wages FY 2018

€948 million
Flat YoY

**ISIF Capital underpinning
Irish based employment**

Regional economic impact of investments

Geographically balanced, broadly in line with regional economic activity*



*CSO Regional Split of GVA (2016)

Dublin 45% Leinster 19%
Munster 24% Connacht 7%
Ulster 5%

ISIF Investees FY 2018

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See Appendix 3 for a list and description of Irish based projects and businesses



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02 | 2018 Economic Impact Results



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Appendix 1 – Assumptions, Methodology and Disclaimer

The NTMA adopts a **conservative approach** to all data and in many cases excludes data where ISIF does have an impact but it is difficult to quantify.

Assumptions and Methodology

1. The NTMA collected data on underlying investees. While economic impact data is somewhat complicated, the NTMA has adopted a structured approach to the collection and analysis of the data.
2. Underlying investees are either direct or indirect (i.e. through Funds), the economic impact data is gathered through a semi-annual survey process of the direct and indirect underlying investees. The economic impact of an underlying investee is only included once i.e. where the ISIF has more than one indirect investment in an underlying investee the duplicate economic impact is removed from the analysis.
3. In cases where ISIF finances a specific project in a large entity, the NTMA only captures the economic impact for the project and not any benefits it may bring to the wider corporate entity.
4. The Fund does not capture the economic impact from investments the ISIF has exited which could be significant.
5. There is some time lag between the achievement of economic impact and the commitment to a investment. Typically, economic impact is generated when there is a draw down on committed capital and this can be months/years after a commitment to an investment.
6. The NTMA completes a check of all survey data for reasonableness. However, the NTMA is reliant on the underlying investees to provide accurate data and is not in a position to verify the data submitted.
7. Surveys provided in USD were converted to EUR, income statement metrics were converted to EUR using a 12 month average FX rate sourced from Bloomberg.
8. The regional distribution of capital invested is weighted based on the capital invested as at 31 December 2018 and based on the underlying investees detailing the location/regional activities of the underlying investee/project. Where underlying investees operate on a nationwide basis, the capital invested is weighted by population, this population data is sourced from the Central Statistics Office.
9. The regional distribution of underlying investees employment and gross value added is based on data provided by the underlying investees detailing the number of jobs and earnings generated regionally. Where underlying investees operate on a nationwide basis and a reliable regional employment split is unavailable, the total jobs and gross value added is weighted by population.
10. The majority of underlying investees provided the relevant data as at 31 December 2018 directly. There are some exceptional cases where data was unavailable the following assumptions were applied:
 - i. In a very small number of construction projects a Construction Industry Federation multiplier was applied to the capital expenditure to estimate the number of employees.
 - ii. In the case of projects and businesses where third party/contracted headcount was provided but a wage bill was not available, an average wage based on CSO average earnings was applied to the third party/contracted headcount.
 - iii. In a very small number of cases we based the assumptions on relevant industry data such as Teagasc, IWEA and Bord Bia.
11. In line with industry standards, a conservative indirect employment multiplier is applied to direct jobs. The NTMA calculation of employment multipliers is based on CSO methodology and verified by CSO.
12. Exports for some investees are based on an estimate percentage of turnover which would reasonably be expected to be exported based on underlying business activity.

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Appendix 2 - ISIF H1 2019 Investments

ISIF committed **€300** million in H1 2019, unlocking total projects in Ireland of **€842m** including third party capital.

Investment	Description of Investment	Amount €m	Transaction Closed
Quadrant Real Estate Fund II	Financing the development of up to three large prime office blocks in Cork city supporting regional development.	35	Q1 2019
ILIM PRS	Fund's objective is to assemble a portfolio of high quality residential assets to rent primarily through forward purchase and funding.	140	Q1 2019
Green Isle	Funding for the acquisition of Green Isle Foods and Donegal Catch enabling plans to grow revenues and diversify its customer base.	7	Q1 2019
Frontline EMEA Expansion Fund	Expansion stage VC fund that will invest in highly rated North American software companies that are at the point of entering the EMEA.	4	Q1 2019
Beechbrook Capital	SME lending fund providing growth capital to regional Irish businesses with investments typically ranging from €2m to €6m.	20	Q2 2019
ATA	Backing ATA, a precision engineering group, to scale and expand domestic and international operations through the acquisition of Karnasch.	15	Q2 2019
Fountain Healthcare Partners III	Venture fund providing risk capital and expertise to entrepreneurs developing life sciences companies.	20	Q2 2019
Atlantic Bridge Fund IV	Venture fund focused on investing primarily at the expansion capital and growth equity stages in companies that have started to scale.	20	Q2 2019
Vectra	Follow on investment in a successful artificial intelligence cybersecurity company expanding their presence in Ireland.	5	Q2 2019
Gore Street Energy Storage	Financing the build out of energy storage infrastructure in Ireland to support the growth in renewables.	34	Q2 2019
			300

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (1/7)

Fund/Company/Project	Company/Project	Principal Product/Service
ACT	AQ Metrics	Provider of software as a service solutions to the global financial services industry
	Cityswifter	Business intelligence platform for urban business networks
	Decawave	Ultra-wideband wireless transceiver integrated circuits and related products
	Iheed	Medical eLearning
	Internet Corp	Online backup / disaster recovery / infrastructure as a service
	mADme	Mobile engagement and advertising platform for mobile operators
	Ocrex	Automated invoice upload for finance systems
	OralEye	World's largest teledental network
	Scurri	Cloud based platform that provides services to making shipping simple for e-commerce
	Servisbot	Artificial intelligence chatbot orchestration platform for business
	SilverCloud Health	Online health and eTherapy platform provider
	Swrve	Mobile marketing monetisation platform
	Tandem HR	HR software as a service
	VideoElephant	Online video syndicator
	Worldnet	Development and provision of an online payment solution
Activate	Number of active sites across Ireland	Stretch senior debt platform of residential development / site acquisition
AMCS	AMCS	Designs, develops, implements and supports environmental software and solutions for the recycling and waste management industry
Aquacomms	Aquacomms	Specialist sub-sea cable connecting New York and Ireland with onward connections to London
Arch III	Carrick Therapeutics	Developer of drugs targeting cancer resistance
Arch VIII	Genomics Medicine Ireland	Products and services derived from advanced genomic research, analysis and global partnerships
Ardstone	Number of active residential sites across Ireland	Fund targeting residential development in Ireland, with a clear focus on house-building in Dublin's commuter belt
Atlantic Bridge Fund II	Fieldaware	Mobile field service management
	Swrve	Mobile marketing monetisation platform
Atlantic Bridge Fund III	Andapt	Power management solutions
	CivicConnect	Internet of things
	Decawave	Ultra-wideband wireless transceiver integrated circuits and related products
	Hypergrid	Data management, storage and related technology
	Vectra	Applies AI to detect and respond to cyberattacks

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (2/7)

Fund/Company/Project	Company/Project	Principal Product/Service
BMS	Accuflow	Technology and cloud services to power smarter homes and businesses through interactive smart security, energy management, video monitoring and automation
	Adtower	Out of home advertising
	Anam	A2P revenue protection for mobile network operators
	Glantus	Developer and supplier of software solutions
	Irish Medical Systems	Healthcare software company providing electronic patient records
	Irish Studio Media Publishing	Print and digital media company
	Maximum Media	Digital publishing company
	Obelisk	Professional engineering services
	Platform Capital	Wholesale financial services
	SME Finance and Leasing Solutions	Provider of leasing finance
	Trilogy	Managed IT as a Service
	Platform Capital	Administration for financial services
	Urban Volt	Light as a service
	VisibleThread	Software product company focused on sales proposal automation software
	XS Direct	Car Insurance
BGF	Brindley Healthcare	Nursing homes
Causeway Capital	BBs	Chain of coffee and muffin retail stores across the UK and Ireland
	Bizimply	Time and attendance software
	Harkglade Limited and Associates (Celtic Linen)	Commercial laundry business
	Turmec	Engineering business specialising in the design, manufacture and installation of recycling plants and equipment
Carlyle Cardinal Ireland	AA Ireland	Insurance brokers and roadside assistance providers
	Abtran	Business Process Outsourcing
	Carroll Cuisine	Production and distribution of sliced cooked ham and other food products
	Millicent	Manufacturer and seller of women's health pharmaceutical products into the US market
	Payzone	Multi-channel payment solutions
	Sam McCauley	Retail Pharmacy Group
Cherrywood SDZ (Hines)	Cherrywood SDZ (Hines)	Bespoke debt for provision of enabling infrastructure works to unlock residential development housing

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (3/7)

Fund/Company/Project	Company/Project	Principal Product/Service
China Ireland Technology Growth Fund	Decawave	Ultra-wideband wireless transceiver integrated circuits and related products
	Fieldaware	Mobile field service management
	Novaerus	Manufacturer of wall mounted airborne pathogen control devices
	Accuris Networks	WiFi off-load and roaming technologies
	Swrve	Mobile marketing automation software platform
Dublin Waste to Energy	Dublin Waste to Energy Ltd	Waste treatment, power and heat production
Cubic	Cubic	Connectivity/software company
daa	daa	Commercial semi-state airport company
Dasos	Dasos	Invests directly in forestry plantations diversified across Ireland
DCU Student Accommodation	DCU Student Accommodation	Investment in university student accommodation
Delta III	Betapond Limited	Marketing app provider for social networks
	Cleverbug	Personalised greeting cards and gifts
	Corrata (Zapa)	Telecom expense and value management
	Davra Networks	Management system for Internet of Things devices for Cisco distributed networks
	Digit Game Studios	Online multiplayer multiplatform games
	Homestay	Accommodation portal
	Luzern Solutions	Online retailer and online store provider for new and refurbished goods
	mADme	Mobile advertising solutions
	Mobacar	Online car rental software platform
	Sim Local	Local sims for international travellers
	What Clinic	Medical treatment search portal
Draper Esprit	CurrencyFair Ltd	P2P Currency Exchange
Dunport	Abrakebabra Investments Limited	Fast food franchise owner and operator
	BBs	Chain of coffee and muffin retail stores across the UK and Ireland
	Cara Pharmacy	Pharmacy and retail products
	Carne Global Financial Services	Provider of governance and oversight services within the asset management industry
	Extraspace Solutions	Sale and hire of fast track building solutions
	Kenmare Bay Hotel	Hotel accommodation

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (4/7)

Fund/Company/Project	Company/Project	Principal Product/Service
Dunport	Kinsale Hotel	Hotel accommodation
	Magnet	Broadband and phone services
	Openmind	Consolidated messaging platform for mobile operators
	Rye River	Irish Craft Beer brewer and agent distributor
	Weston Office Solution	Flexible workspace provider
Finance Ireland	Over 2,000 companies supported through Finance Ireland financing	
Fine Grain	Number of active sites / income producing assets across Ireland	Commercial real estate finance
Forestry	1st Forestry Fund	Invests directly in forestry plantations diversified across Ireland
Fountain I	Mainstay Medical	Manufacturer of medical device for treatment of chronic lower back pain
	Opsona Therapeutics	Developer of drugs for the treatment of autoimmune and inflammatory diseases
	Vivasure Medical	Medical vascular closure device
Fountain II	Inflazome	Inhibitors of the NLRP3 inflammasome
	Inflection Biosciences	Developing small molecule therapeutics for the treatment of cancer.
	Neurent Medical	Medical devices
	Neuromod Devices Limited	Medical devices
Frontline I	AQ Metrics	Risk/Compliance technology
	Boxever Ltd	SaaS customer intelligence platform for airline and travel industry
	BoxFish	Second screen big data analytics
	BuildingEye	Planning permission technology
	CurrencyFair Ltd	P2P Currency Exchange
	Drop	Connected kitchen products
	Linked Finance	P2P SME lending marketplace
	Logentries	Cloud-based service provider for collecting and analyzing huge log data
	Love & Robots	3D Printing
	PageFair Ltd	Adblocking software
	Pomo Search	Putting shops online automatically
	Qstream	Mobile sales enabling service
	Roomex	Hotel Booking Platform
	Verify	Drone technology

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (5/7)

Fund/Company/Project	Company/Project	Principal Product/Service
Frontline II	Brightflag	Business intelligence for legal spend management
	Go Litely	Child car seat
	Payslip	Global Payroll Management Platform
	Rosebud IOT	Tech support software for management of IOT
	Siren	Business intelligence
	Tandem HR	HR Software as a service for talent management
Genesis Aircraft Services	Genesis Aircraft Services	Aircraft leasing
Wuxi-NextCODE/GMI	Wuxi-NextCODE/GMI	Company leading a large-scale genomics research study across Ireland
Greencoat	Greencoat	Irish renewable energy infrastructure company
Highland Europe	AMCS	Software solutions for the waste management industry
	Jampp	Data-driven mobile app marketing platform
	Malwarebytes	Anti-malware software
InsideSales	InsideSales	Sales acceleration software
Investec Ventures	Accuris Networks	WiFi off-load and roaming technologies
	Betapond Limited	Marketing app provider for social networks
	Davra Networks	Management system for Internet of Things devices for Cisco distributed networks
	Diona Technologies	Diona is addressing the demand for mobile solutions in the HHS market
	Mick's Garage	The company sells car parts and is Ireland's leading on-line car-parts retailer
	Rainmaker Business Technologies	Provider of business intelligence and performance software to the airline sector
	RAPT Touch Ltd	Develops multi-touch screen technologies for incorporation into large screens
	SilverCloud Health	SilverCloud Health Limited provides online therapeutic solutions via tailored clinical programs
	Terminal Four Solutions	Developer of enterprise web content management software for the higher education market globally
	Yearsa	Helps traditional publishers distribute electronic copies of their books ("eBooks")
Irish Infrastructure Fund	Convention Centre Ireland	Ireland's only purpose built convention centre positioned on the banks of the River Liffey in the centre of Dublin
	Cyclone Wind Farm Portfolio	Portfolio of 10 wind farms located in both the ROI and NI, generating electricity for sale into the Single Electricity Market
	Enet	Managed bandwidth and infrastructure access telecom services
	Towercom Limited	Largest independent telecom tower / mast owner in the Republic of Ireland and owns/controls 406 telecom tower/mast sites
	Valley Healthcare	Primary care centres

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (6/7)

Fund/Company/Project	Company/Project	Principal Product/Service
Irish Water	Irish Water	National service provider of water and treatment of wastewater
Irish Whiskey Growth Fund	Glendalough Irish Whiskey	Branded spirits company
Kaseya	Kaseya	IT solutions to support the IT industry
Kilkenny Regeneration	Kilkenny Regeneration	Urban regeneration project
Lightstone Ventures	Alexo Therapeutics	Developer of novel biologics with goal of discovering new drugs to help the human immune system to eradicate cancer
	Carrick Therapeutics Limited	R&D Oncology
	FIRE1	Developing a novel, therapeutic medical device for a major unmet medical need
Mainstay Medical	Mainstay Medical	Manufacturer of medical device for treatment of chronic lower back pain
Malin	3D4Medical	Develops medical, educational and health fitness apps
	AN2H Discovery	Designs novel small molecule therapeutics
	NeuVT Limited	Develops vascular devices
Man Aalto	Number of residential active sites across Ireland	Real estate investor targeting smaller property developers with less access to debt financing
Milkflex	Milkflex	Innovative loan product that helps protect farm incomes from the impact of dairy market volatility, seasonality and disease outbreak.
Motive	GlobalShares	Provider of equity compensation management solutions
Nautilus	Nautilus	Water-cooled data centres
NTR Small Wind	Number of projects across Ireland and UK	Wind Energy
Panelto	Panelto	Manufacturer of high quality, high volume artisan style breads for the larger retailers in UK and Ireland
Polaris VI	Boxever Ltd	SaaS customer intelligence platform for airline and travel industry
	InsideSales	Sales acceleration software
	Profitero	Competitive pricing, intelligence and e-commerce insights for brand manufacturers and retailers
Polaris VII	GMI	Company leading a large-scale genomics research study across Ireland
	InsideSales	Sales acceleration software
	Novaerus	Manufacturer of wall mounted airborne pathogen control devices
Polaris VIII	Pomo Search	Putting shops online automatically
	Qstream	Mobile Sales enabling service
	Voysis	Voice AI platform
Quadrant I	Number of active CRE / Residential sites in Dublin	Mezzanine lender for CRE / Residential
RPFP	RPFP	Pilot receivables purchase facility with Dairygold
Shannon Airport Authority	Shannon Airport Authority	Long term debt facility to support the upgrade of the existing runway

Appendix 3 – Summary of Underlying Irish Based Investments at 31 Dec 2018 (7/7)

Fund/Company/Project	Company/Project	Principal Product/Service
Seroba II	Novate Medical	Convertible vena cava filter for prevention of pulmonary embolism
	Opsona Therapeutics	Developer of drugs for the treatment of autoimmune and inflammatory diseases
	Veryan Holdings Ltd	Development of stents with a unique 3D geometry, for treatment of vascular disease
Seroba III	Atlantic Therapeutics	Manufacture of Devices for treatment on Incontinence
SVB	Venture Debt	7 unique underlying companies – bank confidentiality precludes disclosure of borrowers names
Swrve	Swrve	Mobile marketing automation software platform
Temporis	Encavis	Fund developing pre-construction renewable energy projects
Urbeo	Urbeo	Private rental sector fund
Vectra	Vectra	Applies AI to detect and respond to cyberattacks
WLR Cardinal	Number of active sites / income producing assets across Ireland	Mezzanine / flexible capital provider to residential and CRE development

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